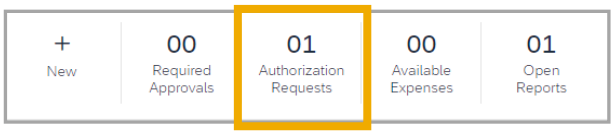
UNC Travel Services | FINANCE AND OPERATIONS

Linking an Approved Travel Request to an Expense Report

Creating a Report from a Request

You can create an expense report from an approved travel request. Follow these steps to create a new expense report from an approved travel request:

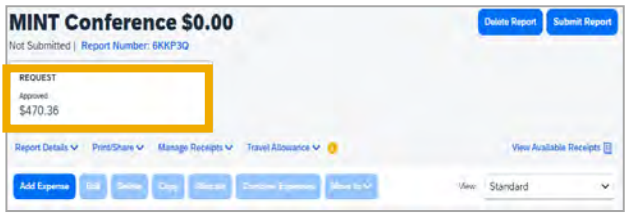
1. Open the Active Requests page by clicking on the **Authorization Requests** tab.



2. Select the Travel Request you want to create an expense report for.

3. Click the **Create Expense Report** button.

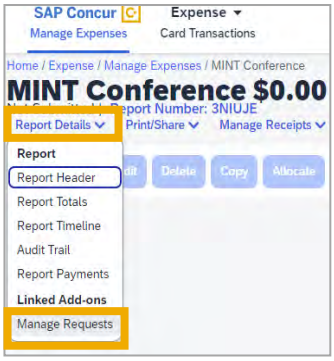
Result: All details of the approved Travel Request will populate on the Expense Report. The total approved amount of the Request will be listed at the top of the expense report as shown below.



Linking a Request with a Report

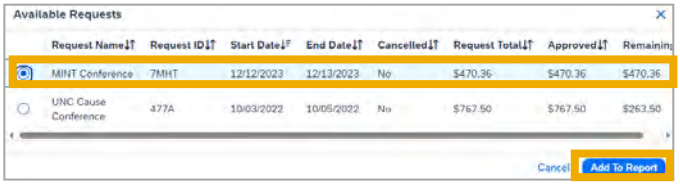
To attach a request to a report:

1. Select the **Report Details** dropdown. Then from the list, select **Manage Requests**.



2. Click **Add**.

3. In the pop-up window, select from the list the appropriate Request associated with the report. Then click **Add to Report**.



Note: In the pop-up message, select **Update**.

4. Click **Close** to return to the Report.

Result: The Request is attached to the Report. The total approved amount of the Request will be listed at the top of the expense report as shown below.